31 January 1997

STANDARD OPERATING PROCEDURE D65-03-01

From: D65
To: D65 Division

Subj: DIVISION TASKING REVIEWS FOR STANDARD AND CUSTOM PRODUCTS

Ref: : (a) SOP D65-16-1, Division Quality Records
Encl: : (1) Division Tasking Review Form

1. Purpose. To establish and define the tasking requirement review process for standard and custom products/services.

2. Scope and Application. This procedure applies to all Division tasking requirements for standard and custom products/services (see definition below). This procedure directly concerns each Branch.

3. Policy. The Division tasking review process ensures that sponsor/customer requirements are understood and, most importantly, can be met. For program taskings greater than or equal to $50K, the Division Head will conduct the tasking review.

4. Definitions. Standard and custom products/services are defined below.

   a. Standard products/services - Products/services we regularly provide that already have standard specifications, documentation, test procedures and Quality Assurance (QA) criteria. Standard products/services do not require any modifications or customizing.

   b. Custom products/services - Products/services that require customized engineering design or design modifications.

5. Procedure. The following procedure and guidelines describe the Division tasking review process

   a. Receiving Orders - Designated branch points of contact (POCs) in the appropriate Branch receive all mailings, faxes and phone calls regarding their tasking requirements. Designated branch POCs documents tasking requirements received by phone using the Tasking Agreement form enclosed in this procedure (or any approved form) and then verifies these requirements with the sponsor/customer.

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b. <u>Order Review -</u> Designated branch POCs review the tasking requirements received by mail, fax, or phone to verify that (1) part numbers/NSNs (if used) are valid and match the description of product/service, (2) we have completely described the products so that the type, style or grade of product is clear, and (3) the shipping and funding requirements are complete and valid. Designated branch POCs carefully review the whole tasking requirement to note any special requirements such as specific delivery dates, customized packaging, requests for certificates, requests for information or documents, material, etc. Designated branch POCs then stamp the tasking requirements for standard products/services "STANDARD " and tasking requirements for custom products "CUSTOM".

c. <u>Tasking Discrepancies and Corrections</u> - If the tasking requirements require additional information or contain any discrepancies or ambiguities, designated branch POCs will contact the sponsor/customer for clarification. Whoever makes changes to tasking requirements will initial the corrections and additions. If the corrections, or the order itself, are difficult to understand (illegible writing, important information buried in obscure locations, "small print", etc.), designated branch POCs will transcribe the tasking requirement corrections/changes onto the Tasking Agreement Entry form and staple it to the original tasking. Written approval of corrections and changes will always be required from the sponsor/sponsor/customer.

d. <u>Tasking Review and Acceptance</u> - Before accepting any tasking, designated branch POCs review sponsor/customer requirements to see if they can be met. Again, the Division Head will review all taskings greater than or equal to $50K. If we cannot meet a tasking requirement, designated branch POCs will contact the sponsor/customer to discuss modifying the requirement. Designated branch POCs are responsible to ensure that tasking requirements are complete. If a tasking statement contains incomplete information, the branch POC will contact the sponsor/customer to obtain the required information. NOTE - In cases where the Division cannot satisfy tasking requirements <u>and</u> tasking requirements cannot be modified, the Division will, if possible, recommend other options to the sponsor/customer for getting the tasking(s) accomplished.

e. <u>Order Changes and Amendments</u> - Order/tasking changes and amendments received from sponsor/customers are routed to the appropriate designated branch POCs. When designated branch POCs receive a change order, they (1) retrieve the corresponding original order; (2) review the change order for completeness and clarity, and contact the sponsor/customer if more information is needed, (3) determine the status of the original order processing (accepted, entered, packed, or shipped) and evaluate the requested change and its impact on cost and delivery date, (4) complete the Change Order Entry form (or any approved form; this procedure contains a model of the form), (5) and forward the requested change order to Engineering,

Production Control, Production, Purchasing, or QA for acknowledgment. NOTE - When production

scheduling considerations require immediate implementation of a change order, the Branch Head can authorize the implementation of the change order before receipt of the formal sponsor/customer acceptance.

6. Administration. Upon completion of the tasking requirements review and verification of Division capability and capacity to meet tasking requirements, designated branch POCs date, initial, and stamp the order "ACCEPTED." A stamped copy of the order constitutes a record of its review (NOTE - Procedure SOP-16-01, Quality Records, specifies the storage location and retention period for the tasking requirement review record). By dating, initialing, and stamping the change order "ACCEPTED", designated branch POCs are committing the Division to meeting sponsor/customer requirements. Designated branch POCs will keep change orders together with the original tasking orders.

THOMAS S. DODSON

(Date)

DIVISION TASKING REVIEW FORM

1. Program/Task Title:

2. Program Sponsor/Customer (including organization, mailing address, phone number(s) and e-mail address):

3. Task Summary:

4. Summary of Resources required and Division capabilities:

    a. Personnel:

    b. Hardware/Firmware/Software:

    c. Systems and Equipment (i.e. Test Equipment, Hot Test Bed, etc.):

    d. Facilities:

    e. Subcontractor:

    f. Other:

5. Division Performance Assessment Summary (Does the Division have the capabilities to perform the tasking(s) and meet sponsor/customer requirements?):

Prepared by: (Program Manager/Project Engineer)

Approved by: (Branch Head and date)

Approved by: (Division Head and date; NOTE - Division Head approval only required for program taskings greater than or equal to $50K)

                                                Enclosure (1)